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UTILITY PATENT APPLICATION TRANSMITTAL <i>(Only for new nonprovisional applications under 37 CFR 1.53(b))</i>	Title of Invention	Reviewing And Merging Electronic Documents
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APPLICATION ELEMENTS 1. <input type="checkbox"/> Fee Transmittal Form <i>(Submit an original, and a duplicate for fee processing)</i> 2. <input checked="" type="checkbox"/> Specification, Claims, and Abstract Total Pages 21 3. <input type="checkbox"/> Drawings Total Sheets 8 4. Oath or Declaration Total Pages a. <input type="checkbox"/> Newly executed (original or copy) b. <input type="checkbox"/> Copy from prior application (37 CFR 1.63(d)) <i>(for continuation/divisional with Box 17 completed)</i> [Note Box 5 Below] (i) <input type="checkbox"/> <u>DELETION OF INVENTOR(S)</u> Signed statement attached deleting inventor(s) named in the prior application, see 37 CFR 1.63(d)(2) and 1.33(b). 5. <input type="checkbox"/> Incorporation by Reference <i>(usable if Box 4b is checked)</i> The entire disclosure of the prior application, from which a copy of the oath or declaration is supplied under Box 4b, is considered as being part of the disclosure of the accompanying application and is hereby incorporated by reference therein. 6. <input type="checkbox"/> Microfiche Computer Program (<i>Appendix</i>) 7. <input type="checkbox"/> Nucleotide and/or Amino Acid Sequence Submission (<i>if applicable, all necessary</i>) a. <input type="checkbox"/> Computer Readable Copy b. <input type="checkbox"/> Paper Copy (identical to computer copy) c. <input type="checkbox"/> Statement verifying identity of above copies	Assistant Commissioner for Patents ADDRESS TO: Box Patent Application Washington, D.C. 20231 ACCOMPANYING APPLICATION PARTS 8. <input type="checkbox"/> Assignment: a. <input type="checkbox"/> Assignment Papers (cover sheet & document(s)) b. <input type="checkbox"/> Assignment is of record in parent application No. _____ 9. <input type="checkbox"/> 37 CFR 3.73(b) Statement <i>(when there is an assignee)</i> <input type="checkbox"/> Power of Attorney by assignee 10. <input type="checkbox"/> English Translation Document (<i>if applicable</i>) 11. <input type="checkbox"/> Information Disclosure Statement (IDS) PTO-1449 <input type="checkbox"/> Copies of IDS Citations 12. <input type="checkbox"/> Preliminary Amendment 13. <input checked="" type="checkbox"/> Return Receipt Postcard (MPEP 503) <i>(Should be specifically itemized)</i> 14. <input type="checkbox"/> Small Entity Statement(s) <input type="checkbox"/> Statement filed in prior application Status still proper and desired 15. <input type="checkbox"/> Certified Copy of Priority Document(s) 16. <input type="checkbox"/> Other: _____ _____ _____
	17. If a CONTINUING APPLICATION , check appropriate box and supply the requisite information: <input type="checkbox"/> Continuation <input type="checkbox"/> Divisional <input type="checkbox"/> Continuation-in-part (CIP) of prior application No: _____ 18. CORRESPONDENCE ADDRESS: Dale Lischer, Esq. JONES & ASKEW, LLP 2400 Monarch Tower 3424 Peachtree Road, N.E. Atlanta, Georgia 30326 By: <u>Dale Lischer</u> Reg. No. 28,438 Date: 5-22-2000 Telephone: 404-949-2400 Facsimile: 404-949-2499

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"REVIEWING AND MERGING ELECTRONIC DOCUMENTS"

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Technical Field

The present invention relates generally to reviewing and merging electronic documents in a computer system. More particularly, the present invention relates to automatically displaying the reviewing features of an application program, and facilitating the merger of an electronic document with an original electronic document.

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Background of the Invention

Authors of documents typically from time to time require the input of others with respect to a particular document the author is preparing. In performing this collaborative effort, documents are sent from one person to another with the understanding that the receiver of the document will review it, make changes as the receiver sees fit, and return the document to the originator who will generally be the author of the original document. This exchange may be repeated several times and the document may be sent to more than one person to be reviewed and edited.

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A common practice is to create an electronic document using a computer implemented application program. Once the document has been created, it is sent to a reviewer who can open the document within a compatible application program. With the document opened, the reviewer may review the document and make edits that may include comments within the text. If special editing features are available within the application program, the reviewer must be familiar enough with the application program to initiate the user interfaces for the features. After all appropriate edits are completed, the reviewer may return a copy of the edited electronic document to the author.

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Once the author receives the copy of the edited electronic document, the author must locate on disk or other memory device the electronic document that was originally sent for review. After the electronic document is opened, the author must merge the changes received

5 from the edited electronic document into the electronic document. This can be performed in many different ways. First, the author may simply review the two documents and manually edit the electronic document to reflect the changes received in the edited electronic document. If the application program contains a feature for merging and the author is familiar with the initiation of this feature, the electronic document can be modified to reflect the changes in the edited electronic
10 document utilizing the merging feature.

Regardless of how the document is merged, the author must manually search for the electronic document on disk or other memory device and must be familiar with the initiation of the merging feature of the application program if in fact it contains such a merging feature. In addition, with respect to the reviewing of the document, the reviewer must also be aware of any
15 special reviewing features of the application program and how to initiate their user interfaces as well.

Accordingly, there remains a need in the art for automatically displaying reviewing features within application programs, automatically locating an original electronic document once the reviewed document has been returned to a computer system, and automatically displaying
20 document merging features within an application program.

Summary of the Invention

The present invention fulfills the need in the art for automatically displaying reviewing features within application programs, automatically locating an original electronic document once
25 the reviewed document has been returned to a computer system, and automatically displaying document merging features within an application program.

In accordance with one aspect of the present invention, a system and method are provided for reviewing and editing an electronic document. A copy of the electronic document is received from the author's computer. The electronic document has a first property identifying
30 the location of the electronic document on disk or other memory device. This property also indicates that the copy of the electronic document is to be reviewed. The first property may be a unique identification number and may be a custom OLE document property. In addition to the first property, a second property may be added indicating the electronic mail address from which the copy of the electronic document was sent. The second property may be a custom OLE
35 document property as well. The first and second properties may be added to the document in

5 response to detecting that the electronic document is attached to an electronic mail message, in response to detecting that a selectable control element corresponding to the electronic document is dragged into an electronic mail message, or in response to detecting that a portion of the electronic document is pasted into an electronic mail message. The first and second properties may also be added in response to a "send for review" user input.

10 In response to receiving the copy of the electronic document, the copy of the electronic document is opened and displayed by an application program. The application program is configured to detect the first property and in response thereto, to display on the display device a review toolbar comprising selectable control elements corresponding to document review operations. The review tool bar may be continuously displayed until the reviewer generates a
15 command to dismiss it. An edited electronic document is created for editing the copy of the electronic document. Finally the edited electronic document having the first property and second property is sent back to the author's computer.

Another aspect of the invention involves sending to a reviewer a copy of an electronic document, the copy having a first property identifying the location of the electronic document on disk or other memory device and also indicating that review of the copy has been requested. The
20 first property may be a unique identification number and may also be custom OLE document properties. In addition to the first property, a second property may be added indicating the electronic mail address from which the copy of the electronic document was sent. The second property may be a custom OLE document property as well. The first and second property may
25 be added to the document when the document is attached to an electronic mail message, when a selectable control element corresponding to the electronic document is dragged into an electronic mail message, or by when the electronic document is pasted into an electronic mail message. The first and second property may be added in response to a "send for review" user input command.

After the document is reviewed and edited, the edited electronic document having the first
30 property is returned to the author. The edited electronic document may also include the second property. Based on the first property identifying the memory location of the original electronic document, the original electronic document is retrieved from the disk or other memory device and may be automatically merged with the edited electronic document.

These and other aspects and features of the present invention will be readily apparent
35 after an examination of the following detailed description of the exemplary embodiments.

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Brief Description Of The Drawings

FIG. 1 is a functional block diagram of an exemplary operating environment for implementation of the exemplary embodiments of the present invention;

FIG. 2 is a flow chart that illustrates the general operation of an exemplary embodiment
10 of the present invention; and

FIG. 3 through 8 are flow charts that illustrates in more detail the general operation of the exemplary embodiment of the present invention as shown in FIG. 2.

Detailed Description of the Exemplary Embodiments

15 The present invention is directed to a system and method for reviewing and merging electronic documents. In one embodiment, the present invention is incorporated into the "OFFICE 2000" suite of application programs that is marketed by Microsoft Corporation of Redmond, Washington. Briefly described, the invention provides for automatic display of reviewing features within application programs, automatic location of an original electronic
20 document once a reviewed document has been returned to a computer system, and automatic display of document merging features within an application program. For example, an author may choose to have a particular document reviewed. Once an electronic document has been chosen, the author will identify the document as one to be reviewed and send it to a reviewer. In an exemplary embodiment, the copy of the electronic document is sent via electronic mail.
25 However, those skilled in the art will appreciate that other methods and protocols of sending documents may be employed such as electronic facsimile, routing slips, ftp, http and the like. Once the document is attached to an electronic mail note, properties are automatically added to the document. Properties added to the document may include a property identifying the location of the document in memory on the author's computer and a property identifying the author's
30 electronic mail address may be added.

When the document is sent to and received by the reviewer, it is opened in an appropriate application software. The application program is configured to detect the properties of the document. In response to detecting the first property indicating that the document was marked for review, a reviewing tool bar is automatically displayed for the reviewer. Once the document
35 has been reviewed and edited, it is sent back to the author. The properties persist in the edited

5 electronic document and are detected by the author's application program when the edited document is opened. The first property allows the original electronic document to be located in the memory of the author's computer. The first property also triggers the application program to automatically prompt the author to merge the edited electronic document with the original electronic document.

10 The description of the exemplary embodiment of the present invention will hereinafter refer to the drawing, in which like numerals indicate like elements throughout the several figures. Beginning with FIG. 1, an exemplary operating environment for implementation of an exemplary embodiment of the present invention is shown. Within the exemplary operating environment, the present invention may operate to facilitate the review of an electronic document, the creation of
15 an edited electronic document and the merging of the edited electronic document with the electronic document. However, those skilled in the art should appreciate that the invention may be practiced in any type of computer operating environment such as hand-held devices, multiprocessor systems, microprocessor-based or programmable consumer electronics, minicomputers, mainframe computers, and the like. The invention may also be practiced in
20 distributed computing environments where tasks are performed by remote processing devices

The exemplary embodiment of the present invention will be described in the general context of a review program module **136** which facilitates review of an electronic document, interacts with a document editing application program **138** and an electronic mail application program **137**, in order to create an edited electronic document, and merger of the edited electronic
25 document with the electronic document. Those skilled in the art will recognize that the invention may be implemented in combination with various other program modules **139**. Generally, program modules include routines, programs, components, data structures, etc. that perform particular tasks or implement particular abstract data types. Moreover, those skilled in the art will appreciate that the invention may be practiced with computer system configurations other
30 than the one shown, that are linked through a communications network. In a distributed computing environment, program modules may be located in both local and remote memory storage devices.

An exemplary operating environment **100** for implementing the invention includes a conventional personal computer system **120**, including a processing unit **121**, a system memory
35 **122**, and a system bus **123** that couples the system memory **122** to the processing unit **121**. The

5 system memory **122** includes read only memory (ROM) **124** and random access memory (RAM) **125**. A basic input/output system **126** (BIOS), containing the basic routines that help to transfer information between elements within the personal computer system **120**, such as during start-up, is stored in ROM **124**.

10 The personal computer system **120** further includes a hard disk drive **127**, a magnetic disk drive **128**, e.g., to read from or write to a removable disk **129**, and an optical disk drive **130**, e.g., for reading a CD-ROM disk **131** or to read from or write to other optical media. The hard disk drive **127**, magnetic disk drive **128**, and optical disk drive **130** are connected to the system bus **123** by a hard disk drive interface **132**, a magnetic disk drive interface **133**, and an optical drive interface **134**, respectively. The drives and their associated computer-readable media provide
15 nonvolatile storage for the personal computer system **120**. For example, a data file **160** comprising an electronic document may be stored in the RAM **125** of hard disk **127** of the personal computer **120**. Although the description of computer-readable media above refers to a hard disk, a removable magnetic disk and a CD-ROM disk, it should be appreciated by those skilled in the art that other types of media that are readable by a computer system, such as
20 magnetic cassettes, flash memory cards, digital video disks, Bernoulli cartridges, and the like, may also be used in the exemplary operating environment.

A number of program modules may be stored in the drives and RAM **125**, including an operating system **135**, review program module **136**, an electronic mail program module **137**, a document editing program module **138**, and other program modules **139**. In particular, the review
25 program module **136** which facilitates review of an electronic document, interacts with the document editing application program **138** and the electronic mail application program **137**, in order to create an edited electronic document, and merger of the edited electronic document with the electronic document. An exemplary embodiment of the review program module **136** will be described in detail with reference to FIG. 2.

30 Other input devices (not shown) may include a microphone, joystick, game pad, satellite dish, scanner, or the like. These and other input devices are often connected to the processing unit **121** through a serial port interface **146** that is coupled to the system bus, but may be connected by other interfaces, such as a game port or a universal serial bus (USB). A display device **147** or other type of device such as a monitor is also connected to the system bus **123** via
35 an interface, such as a video adapter **148**. In addition to the monitor, personal computer systems

5 typically include other peripheral output devices (not shown), such as speakers or printers.

The personal computer system **120** may operate in a networked environment using logical connections to one or more remote computer systems, such as a remote computer system **149**. The remote computer system **149** may be a server, a router, a peer device or other common network node, and typically includes many or all of the elements described relative to the
10 personal computer system **120**, although only a memory storage device **150** has been illustrated in FIG. 1. The logical connections depicted in FIG. 1 include a local area network (LAN) **151** and a wide area network (WAN) **152**. Such networking environments are commonplace in offices, enterprise-wide computer networks, intranets and the Internet.

When used in a LAN networking environment, the personal computer system **120** is
15 connected to the LAN **151** through a network interface **153**. When used in a WAN networking environment, the personal computer system **120** typically includes a modem **154** or other means for establishing communications over the WAN **152**, such as the Internet. The modem **154**, which may be internal or external, is connected to the system bus **123** via the serial port interface **146**. In a networked environment, program modules depicted relative to the personal computer system **120**, or portions thereof, may be stored in the remote memory storage device **150**. For
20 example, the remote memory storage device **150** may store a document editing program **138**, an electronic mail application program **137** and a review program **136**. It will be appreciated that the network connections shown are exemplary and other means of establishing a communications link between the computer systems may be used. It will be further appreciated that the
25 invention could equivalently be implemented on host or server computer systems other than personal computer systems, and could equivalently be transmitted to the host computer system by means other than a CD-ROM, for example, by way of the network connection interface **153**.

Notwithstanding the broad applicability of the principles of the present invention, it should be understood that the configuration of the exemplary embodiment as a review program
30 module **136** for widely-used personal computer systems **120** provides significant advantages. In particular, the review program module **136**, comprising computer-implemented instructions for performing the method of the present invention, described in this specification, is specifically designed to exhibit acceptable memory-use and performance characteristics when implemented on the conventional personal computer system **120**. In so configuring the review program module
35 **136**, certain trade-off balances, particularly between the often conflicting goals of minimizing

memory storage and increasing performance speed, have necessarily been struck. It should be understood that variations of the trade-off balances struck in the exemplary embodiments described in this specification are within the spirit and scope of the present invention, particularly in view of the fact that inevitable improvements in computer hardware and memory storage devices will make other trade-off balances feasible.

Fig. 2 is a flow chart setting forth the general steps involved in a method for reviewing an electronic document. The exemplary method **200** is an overview of a typical document review process. The implementation of the steps of method **200** in accordance with an exemplary embodiment of the present invention will be described in greater detail in FIG. 3 through FIG. 8.

Exemplary method **200** begins at starting block **201** and proceeds to subroutine **210** where the location of an electronic document in the memory of the author's computer is identified. The steps comprising subroutine **210** are shown in FIG. 3 and will be described in greater detail below. Next, the method proceeds to subroutine **220** where the author sends a copy of the electronic document to a reviewer. The copy of the electronic document is marked with properties indicating that review is requested and indicating the location of the electronic document in the author's memory. The steps of subroutine **220** are shown in FIG. 4 and will be described in greater detail below. The method continues to subroutine **230** where a reviewer receives the copy of the electronic document from the author and then edits the copy of the electronic document received from the author. The steps of subroutine **230** are shown in FIG. 5 and will be described in greater detail below.

Exemplary method **200** continues to subroutine **250**, where the reviewer sends the edited electronic document to the author. The steps of subroutine **250** are shown in FIG. 6 and will be described in greater detail below. Next the method continues to subroutine **260**, where the author receives the edited electronic document from the reviewer and then finally to subroutine **270** where the author merges changes from the edited electronic document with the electronic document. The location of the electronic document in the memory of the author's computer is identified in a property attached to the edited electronic document. The steps of subroutine **260** and **270** are shown in FIG. 7 and FIG. 8 respectively and will be described in greater detail below. Exemplary method **200** ends at step **280**.

Turning now to FIG. 3, describing the exemplary subroutine **210** from FIG. 2 in which the location of the electronic document is identified in the memory of the author's computer.

Subroutine **210** begins at starting block **301** and advances to step **305** where the author attaches the electronic document to be reviewed with an electronic mail message. The attachment of the document can be performed in several ways including, 1) pasting the contents of the electronic document into an electronic mail message, 2) dragging a selectable control element associated with the electronic document into the body of the electronic mail message, 3) inserting a file corresponding to the electronic document in the electronic mail message by using an "insert file" feature of an electronic mail program module, or 4) using a "send to >> mail recipient" feature within a document editing program module, or 5) by forwarding an electronic mail message to the recipient with a previously attached copy of the electronic document. Subroutine **210** tests for each of the above methods of attachment as described in the following paragraphs.

At decision block **310** it is determined if the author attached the document by pasting. If the author attached the document by pasting, the method continues to decision block **325**, where the location of the electronic document in the memory is identified. This location in memory is used to create a unique ID and is explained in greater detail in the discussion of figure 4. If the document was not attached by pasting, then the method continues to decision block **315** where it is determined if the author attached the document by dragging. If the author attached the document by dragging, the method continues to decision block **325**, for identification of the memory location. If the document was not attached by dragging, the method continues to decision block **320** where the method determines if the author attached by using an insert file feature. If the author attached the document by using an insert file feature, the method continues to step **325** for identification of the memory location.

From step **325**, the method proceeds to step **330** and returns to subroutine **220** of FIG. 2. From decision **320**, if the author did not attach the document using an insert file feature, the method continues to block **335**, where it is determined if the user attached using a "send to >> mail recipient (as attachment)" feature of a document editing program module. If the author attached the document using "send to >> mail recipient (as attachment)", the method continues to step **340** where the memory location of the electronic document is stored in a registry key. A registry key is a location in memory where name-value pairs may be stored. From step **340** the method continues to step **330** and returns to subroutine **220** of FIG. 2. If at decision **335** it was determined that the author did not attached using a "send to >> mail recipient (as attachment)" feature of a document editing program module, then the method continues to decision step **345** to

5 determine if the author is forwarding an electronic mail with an attachment. If this is true, the method continues to step **350** and no special processing is performed and no reviewing feature is enabled. No special processing can be performed because the system cannot determine the location of the document in the memory since the document did not originate with the author's computer. From step **350**, the method continues to step **355** and returns to step **280**, FIG.2.

10 Turning now to FIG. 4, describing subroutine **220** from FIG. 2, in which the author invokes a command to send a copy of the electronic document to the reviewer. Subroutine **220** begins with starting block **401** and advances to step **405** where the author sends the copy of the electronic document to the reviewer. The method continues to decision block **430**, where it is determined if the author previously invoked a command to disable the review feature of the document editing program with respect to the electronic document. Review features would be disabled if the author was simply sending an attached document to a recipient and had no intentions for the document to be reviewed. If the review features are disabled, the method continues to step **440** and returns to step **280** of FIG. 2 where no further reviewing features are performed.

15 20 Next, subroutine **220** continues to step **450** where a unique ID for the attachment is generated. For example, an ID may be generated by running 32 bit checksum algorithm on the numerical address identifier corresponding to the disk or other memory device location of the electronic document in the author's computer. To make this ID unique, before numerical address identifier is run through the 32 bit checksum algorithm, it may be prepended with a unique sequence for the author. This sequence is a "Global Unique Identifier" (GUID), which is a unique 128 bit number created using the current date and time and other factors.

25 This unique ID along with the location of the electronic document in the memory are stored as a name value pair in the registry. The registry is a special data structure located on the author's computer. The purpose for the unique ID is to provide the electronic document with a property that identifies it as one to be reviewed, as well as identifies the location of the electronic document in the author's computer.

30 From step **450**, the subroutine **220** continues to step **455** where the unique ID is added as appropriate to the attachment. At this point the unique ID is referred to as the review ID. From step **455** subroutine **220** continues to decision block **460** where it is determined from user input if the author's electronic mail address should be added to the attachment. If the author's electronic

5 mail address should be added to the attachment, the subroutine continues to step **465** where a property is added to the attachment indicating the author's electronic mail address. In this case, adding a property means creating a data structure containing information indicating the author's electronic mail address and adding this data structure to the electronic document. The author's electronic mail address may be added so that the reviewer does not have to determine the author's
10 electronic mail address when the edited electronic document is returned. However, due to privacy issues, an author may not wish to publish the author's electronic mail address. Therefore, the author may be presented with the choice to add the author's electronic mail address. If at step **460** it was determined from user input that the author's electronic mail address should not be added to the attachment, or after the electronic mail address property is added at
15 step **465**, the subroutine continues to step **470** and returns to subroutine **230**, FIG. 2.

Turning now to FIG. 5, describing subroutine **230** from FIG.2, in which the reviewer receives a copy of the electronic document. Subroutine **230** begins at starting block **501** and proceeds to step **503** where the reviewer receives an electronic mail message with the copy of the electronic document attached. When the reviewer opens the electronic mail message with the electronic mail program module, a "EmailEntryID" property is added to the attached copy of the
20 electronic document if the document contains a review ID property. The "EmailEntryID" property uniquely identifies the electronic mail message on which the copy of the electronic document arrived. From step **503**, the method continues to step **505** where the reviewer opens the copy of the electronic document in application program module. The method continues to
25 decision block **510** where the copy of the electronic document is checked for a review ID. If the copy of the electronic document does not have a review ID, the method continues to step **520** where no review is performed. From step **520**, the subroutine **230** proceeds to step **525** and returns to step **280** of FIG. 2. If at decision block **510** the copy of the electronic document is found to have a review ID, the method continues to decision block **515** where the registry is
30 checked to see if it contains the review ID. If the registry contains the review ID, then the document must presently be on the author's computer because only the author's computer has this unique review ID in the registry. If the document is received by the author's computer, then the method continues to step **520** where no review is performed. From step **520**, the subroutine **230** proceeds to step **525** and returns to step **280** of FIG. If the registry does not contain the
35 review ID, the method continues to decision block **530** where the copy of the electronic

document is checked to see if it contains a "reviewing tools shown once" property. The "reviewing tools shown once" property allows for the reviewing tool bar to be shown once. The reviewing tool bar may contain selectable control elements corresponding to feature contained in the document editing program module. For example, some the features may include, the ability to alter the color of selected text, underline selected text, or to enable the changes made to the text to be tracked. In addition, the reviewing tool bar may include a "reply with changes" feature for sending the edited document via electronic mail, once the reviewer has performed edits. Upon the first time the reviewer opens the copy of the electronic document, the reviewing tool bar is displayed. However, if the reviewer removes the tool bar from the display, or on any subsequent open of the copy of the electronic document, the system will not automatically cause the reviewing tool bar to reappear. If the document contains this property, the method continues to step 535, where the reviewing tool bar is displayed and the "reviewing tools shown once" property is set on the document. This property is set on the document in order that a subsequent opening of the document will not cause the reviewing tool bar to be displayed. From step 535 or if at decision 530 the document does have a "reviewing tools shown once" property, the method continues to step 540 where the reviewer reviews and edits the copy of the electronic document to create an edited electronic document. From step 540 the method proceeds to step 545 and returns to subroutine 250 of FIG. 2.

Turning now to FIG. 6, describing subroutine 250 from FIG. 2, where the reviewer sends the edited electronic document to the author. Subroutine 250 begins at starting block 601 and advance to step 605 where the reviewer clicks on the "reply with changes" button on the reviewing tool bar. The reply with changes button on the reviewing tool bar initiates the sending of the edited document to the author. From step 605 the method continues to step 606 where the edited electronic document is checked for an "EmailEntryID" property. If this property is present, the method advances to step 608 where an electronic mail message is created by generating a reply to the electronic mail message from which the copy of the electronic document was received. The electronic mail message from which the copy of the electronic document was received is located using the "EmailEntryID" property. From step 608 the method advances to step 640. If an "EmailEntryID" property is not present, the method continues to step 610 where a new electronic mail message is created. Preferably, the reviewer's document editing

5 program communicates with an electronic mail program to automatically create an electronic mail message.

Next, the method proceeds to step **615** where the system enters a default body text to the electronic mail message. For example, the default text may be "I've reviewed the attached document". From step **615**, the method continues to decision block **620**, where the edited
10 document is checked to see if it contains a property identifying the author's electronic mail address. Since the edited electronic document is merely and edited version of the copy of the electronic document, the edited electronic document contains the same properties as the copy of the electronic document. These properties may include the review ID or a property indicating the author's electronic mail address. If the document contains this electronic mail property, the
15 method continues to step **625** where the system enters the author's electronic mail address into the new electronic mail message header. If at decision block **620**, the document does not contain the author's electronic mail address, the system continues to step **630** where the reviewer is prompted to enter the author's electronic mail address. From step **625** or step **630**, the method proceeds to step **635** where the system fills in the electronic mail subject line based on the
20 subject line string property of the aforementioned automatically created electronic mail message.

Next, the edited electronic document is attached to the electronic mail message at step **640**. From step **640**, the method proceeds to step **645** where the electronic mail message with the attached edited electronic document is sent to the author. From step **645** the method continues to step **650** where it returns to subroutine **260**, FIG. 2.

25 Turning now to FIG. 7, describing subroutine **260** of FIG. 2 where the author receives the edited electronic document from the reviewer. Subroutine **260** begins at starting block **701** and then moves to step **705** where the author receives the edited electronic document. From step **705** subroutine **260** proceeds to step **710**, where the author opens the edited electronic document in the appropriate application software. Next, from step **710** the method continues to decision
30 block **715** where the electronic document is checked for a review ID indicating that the document was one sent for review. If the document does not contain a review ID, the method continues to step **730** where it returns to step **280** of FIG. 2. Without a review ID, the document was not intended to be for review thus no merger is required so the method ends. If the document contains a review ID the method proceeds to step **720** where the registry is check to see if the
35 review ID is in the registry. If the ID is in the registry, then the memory location of the

5 electronic document will be in the registry corresponding to the review ID. If the review ID is not in the registry, the system proceeds to step 730 where the method returns to step 280 of FIG. 2. Because the review ID was not in the registry, the document was not intended to be for review thus no merger is required so the method ends. If the review ID is in the registry, the method continues to step 725, where it returns to subroutine 270, FIG. 2 since the document has
10 been identified as one sent for review.

Turning now to FIG. 8, describing subroutine 270 of FIG. 2 where the author merges changes from the edited electronic document with the electronic document. Subroutine 270 begins at starting block 801 and proceeds to step 805 where the system displays an alert. The Alert is a prompt to determine if the author wishes to merge changes. Method 800 then
15 continues to decision block 810 where it is determined if the author wishes to merge the changes. If the author does not wish to merge the changes, the method proceeds to step 825 where the method returns to step 280, FIG. 2.

If the author does wish to merge changes, the method continues through a series of decisions at steps 835, 840, and 850, where it is determined if the edited document has a review ID, if the ID is in the registry and if there is a "ReviewingToolsOnce" setting. If any of these conditions of steps 835, 840, and 850 are not met, the method continues to step 825 where it returns to step 280, FIG. 2. As previously explained, if the document does not contain a review ID or if the ID is not in the registry, the document was never meant for review, thus no merging is possible. If all of the above conditions are satisfied, the method continues to step 855 where
25 the edited electronic document is merged into the electronic document and then to step 857 where the reviewing tool bar is displayed.

From step 857 the method continues to decision block 860 where user input determines if the author wishes to end the review process and complete the review cycle on the electronic document. If the author wishes to end the review, the method continues to step 825 where it
30 returns to step 280, FIG. 2. If not, the method continues to step 857 causing the reviewing tool bar to remain on the display device until the author ends the review cycle on the electronic document by selecting a button on the reviewing tool bar to cause such termination.

In view of the foregoing, it will be appreciated that the present invention provides a method and system for electronic document review and merging. Still, it should be understood
35 that the foregoing relates only to the exemplary embodiments of the present invention, and that

5 numerous changes may be made thereto without departing from the spirit and scope of the invention as defined by the following claims.

5

CLAIMS

We claim:

1. In a computer system comprising an author's computer having a memory for storing an electronic document, a method for reviewing and editing the electronic document, the method comprising:

receiving from the author's computer a copy of the electronic document having a first property identifying the location of the electronic document in the memory of the author's computer and indicating that the copy of the electronic document is to be reviewed;

in response to receiving the copy of the electronic document, opening the copy of the electronic document within an application program and displaying the copy of the electronic document on a display device;

in response to detecting the first property with the application program, displaying on the display device a review toolbar comprising selectable control elements corresponding to document review operations;

in response to user input, editing the copy of the electronic document to create an edited electronic document; and

sending the edited electronic document to the author's computer, said edited electronic document having said first property.

2. The method of Claim 1, wherein the first property comprises a unique identification number identifying the location of the electronic document in the memory.

3. The method in Claim 1, wherein the first property is a custom OLE document property.

4. The method of Claim 1 wherein the copy was received via electronic mail; and wherein the copy of the electronic document further comprises a second property indicating an electronic mail address from which the copy of the electronic document was sent.

5. The method in Claim 4, wherein said second property is a custom OLE document property.

5

7. The method of Claim 1, wherein the first property is created in response to detecting that a selectable control element corresponding to the electronic document has been dragged into an electronic mail message body.

10 detecting that a selectable control element corresponding to the electronic document has been
dragged into an electronic mail message body.

15 body.

9. The method in Claim 1, wherein the review toolbar is continuously displayed until in response to user input the review toolbar is removed from the display device.

[illegible]

5

10. A computer system for reviewing an electronic document, the system comprising:
a memory for storing an electronic document; and
a processing unit functionally coupled to the memory, for executing computer-executable instructions operable for:

10 sending to a reviewer a copy of the electronic document, said copy having a first property identifying the location of the electronic document in the memory and indicating that review of the copy has been requested,

receiving from the reviewer an edited electronic, said edited electronic document comprising an edited version of the electronic document, and said edited electronic document having said first property,

15 based on the first property, retrieving the electronic document from the memory, and

automatically merging the edited electronic document into the electronic document.

20 11. The system of Claim 10, wherein the first property is created in response to attaching said electronic document to an electronic mail message.

25 12. The system of Claim 10, wherein the first property is created in response to detecting that a selectable control element corresponding to the electronic document has been dragged into an electronic mail message body.

30 13. The system of Claim 10, wherein the first property is created in response to detecting that a copy of the electronic document has been pasted into an electronic mail message body.

14. The system of Claim 10 wherein the first property comprises a unique identification number identifying the location of the electronic document in the memory.

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09575516-052200

5 15. The system in Claim 10, wherein the first property is a custom OLE document property.

16. The system of Claim 10 wherein the copy is received via electronic mail; and wherein the copy of the electronic document further comprising a second property indicating an
10 electronic mail address from which the copy of the electronic document was sent.

17. The system in Claim 16, wherein said second property is a custom OLE document property.

15 18. In a computer system comprising a computer having a memory for storing an electronic document, a method for receiving and merging an edited electronic document, the method comprising:

receiving an edited electronic document from a reviewer, said edited electronic document comprising an edited version of the electronic document, said edited electronic document having a
20 first property identifying the location of the electronic document in the memory and indicating that review had been requested;

based on the first property, retrieving the electronic document from the memory; and automatically merging the edited electronic document into the electronic document.

25 19. The method of Claim 18, wherein the first property comprises a unique identification number.

20. The method in Claim 18, wherein the first property is a custom OLE document property.

30 21. The method of Claim 18 wherein the copy of the electronic document was received via electronic mail; and wherein the copy of the electronic document further comprises a second property indicating an electronic mail address from which the copy of the electronic document was sent.

5 22. The method in Claim 18, wherein said second property is a custom OLE
document property.

[illegible]

5

ABSTRACT

A system and method for reviewing an electronic document. A copy of an electronic document is sent to a reviewer, the copy of the electronic document having a first property identifying the location of the electronic document in the memory and indicating that review of the copy has been requested. The reviewer uses an application program to open the copy of the electronic document. The application program detects properties and in response to the first property, automatically displays a review toolbar. The edited electronic document is then sent back to the author having at least a first property. The application program executed by the author detects the properties and in response to the first property, retrieves the original electronic document from the memory and automatically prompts the author to merge the edited electronic document into the electronic document.

20

Attorney Docket No. 13237-2610
Microsoft Reference No. 149407.1

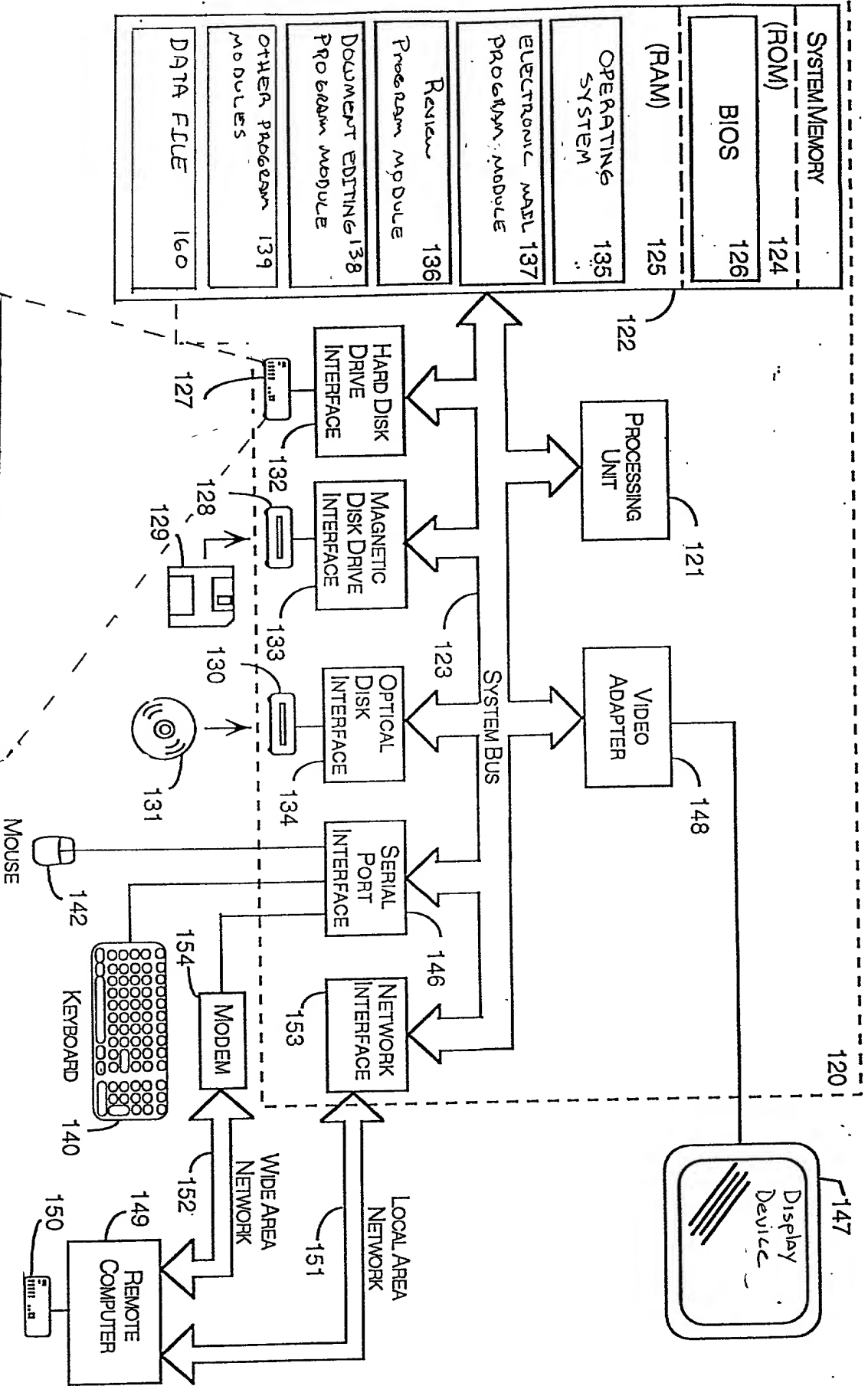


FIG. 1

09575515-052200

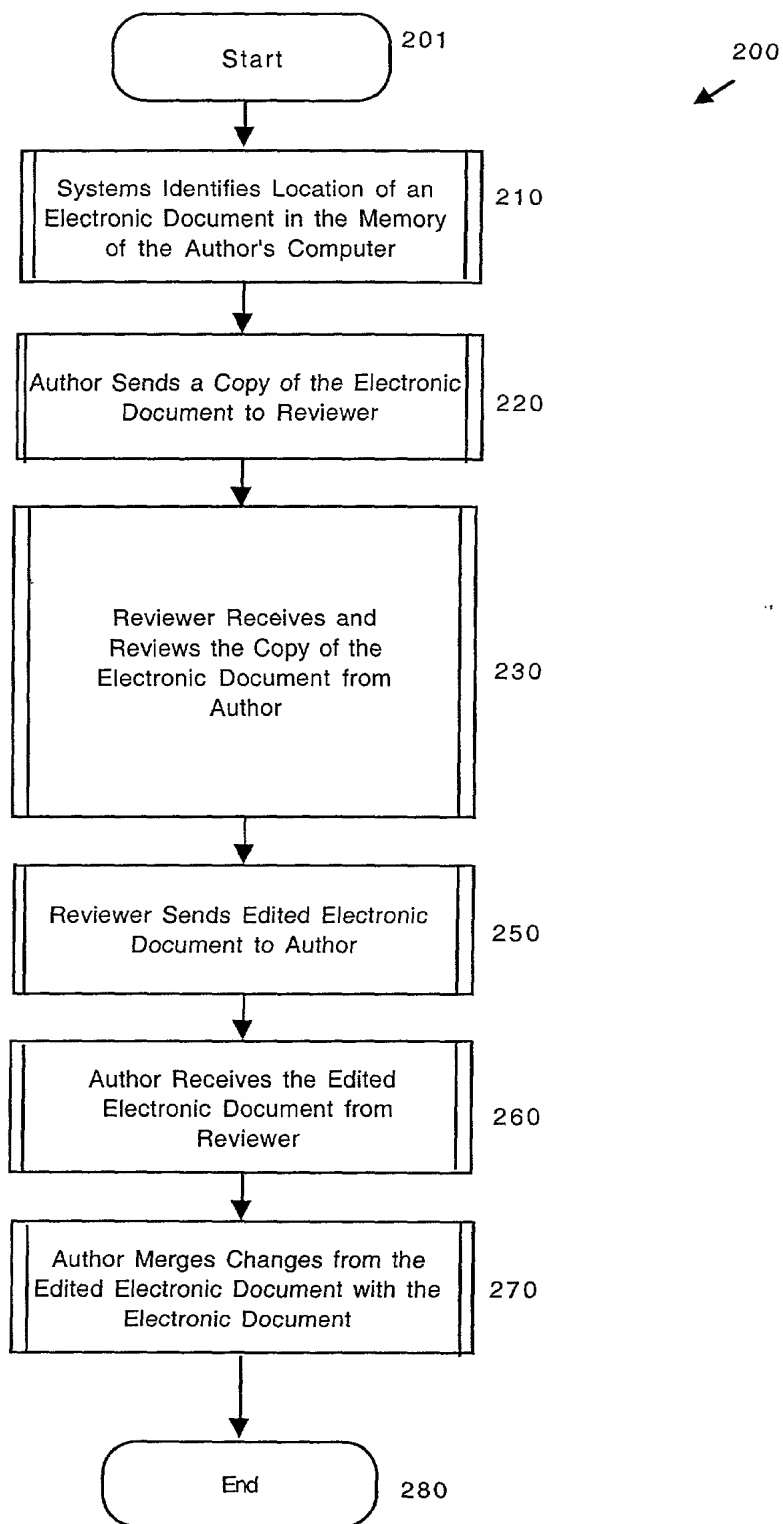


Fig. 2

System Identifies Location of the Electronic Document

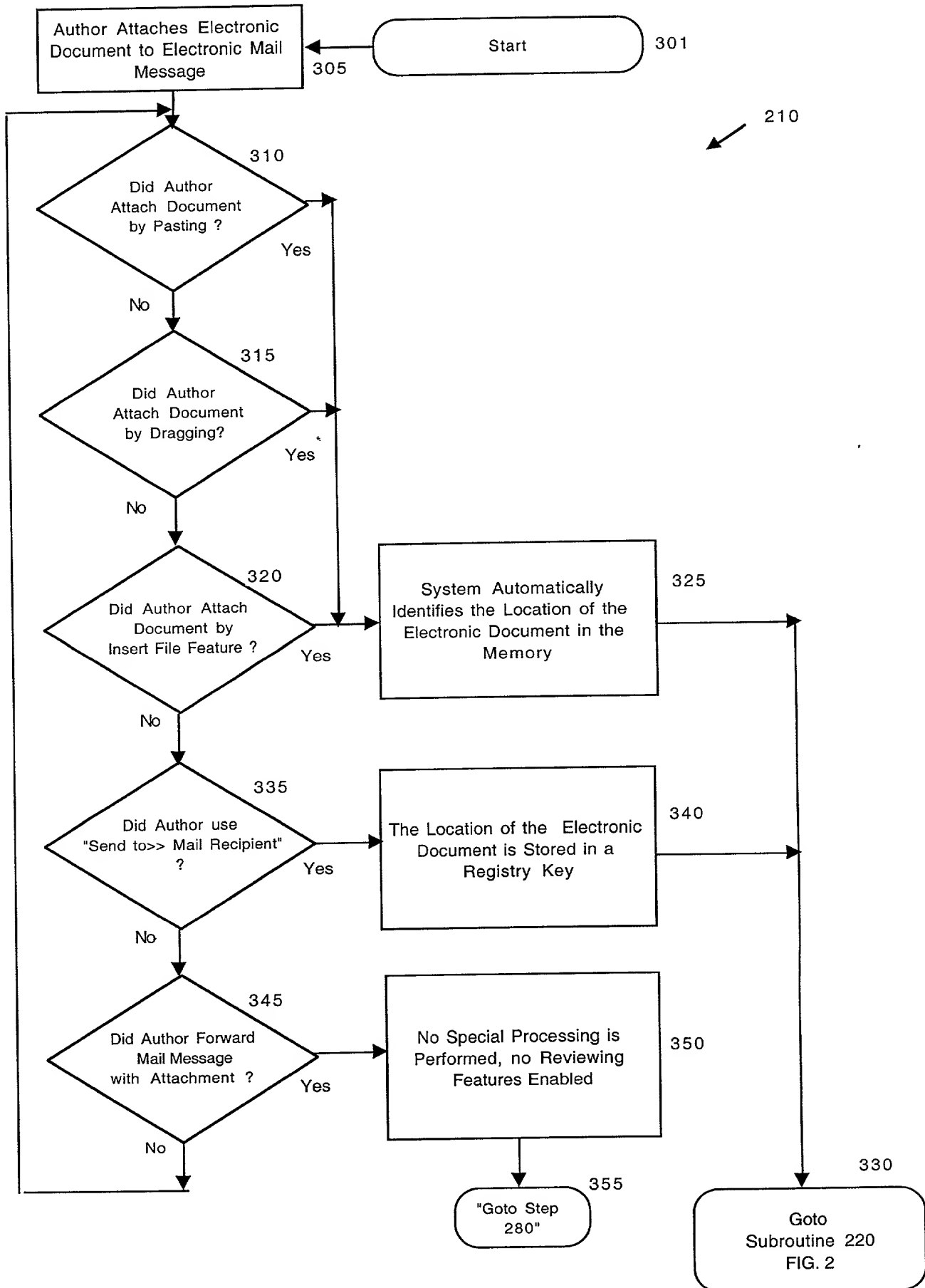


Fig. 3

Author Sends Copy of the Electronic Document to Reviewer

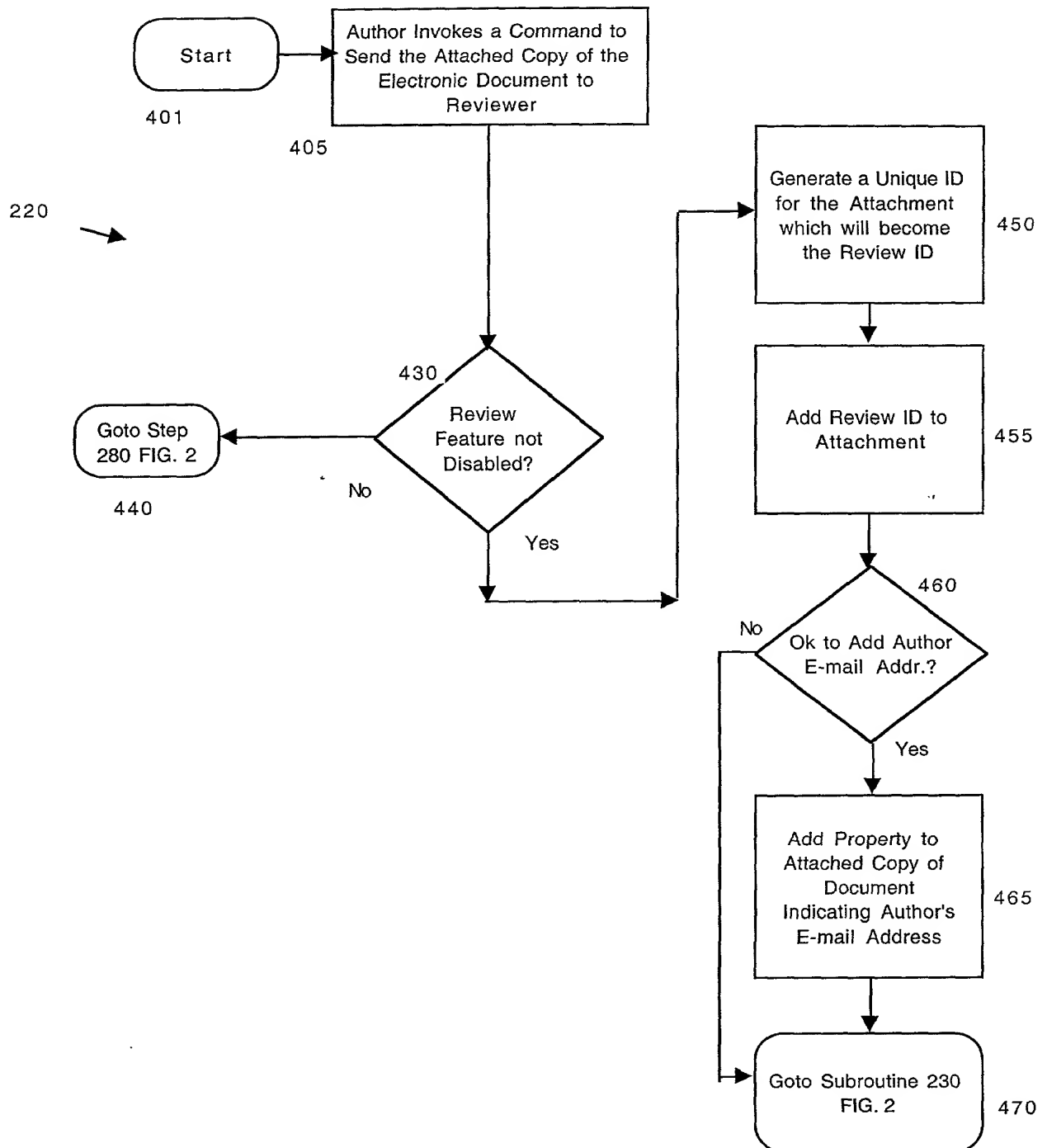


Fig. 4

Reviewer Receives Copy of Electronic Document and Edits

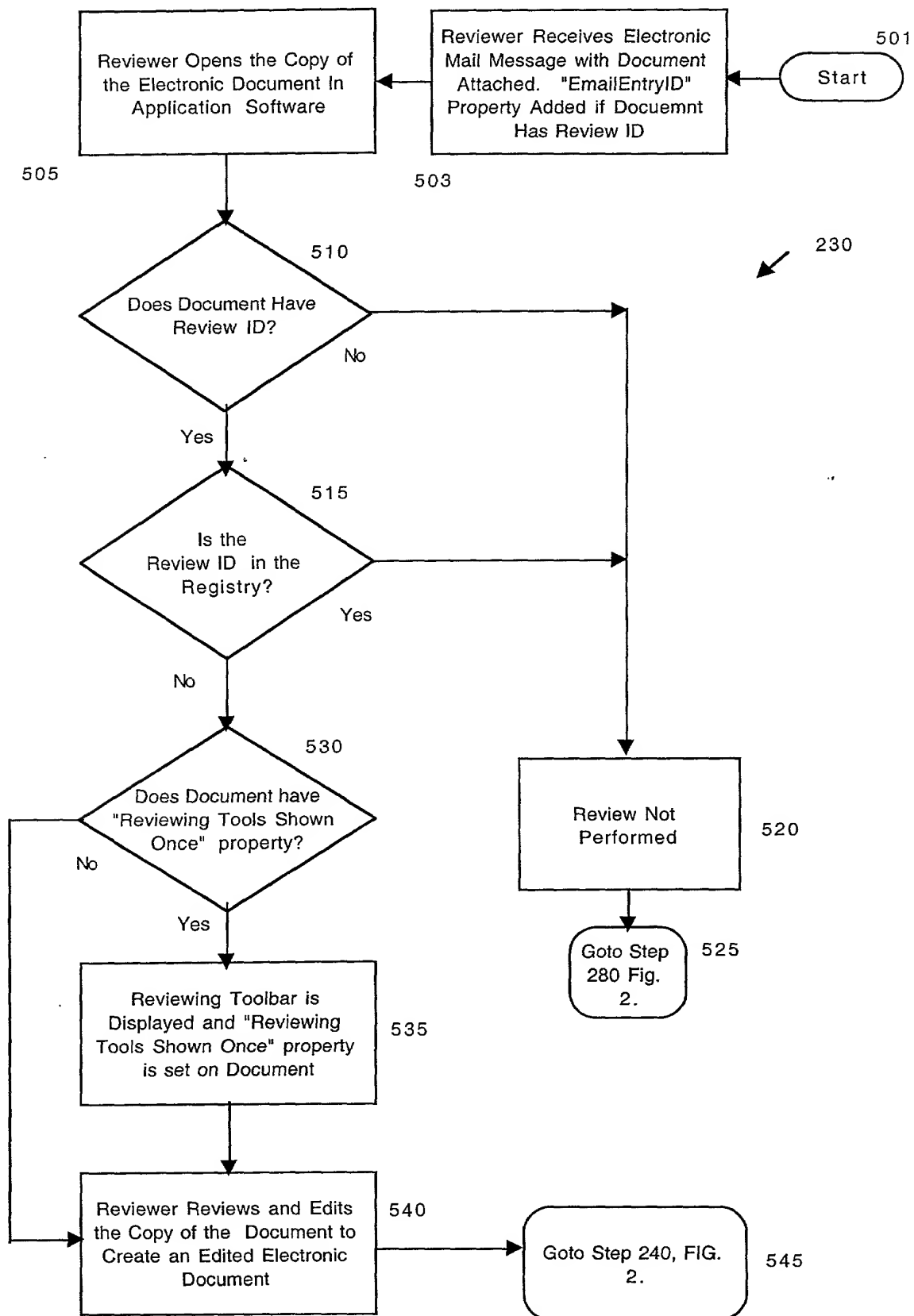


Fig. 5

250

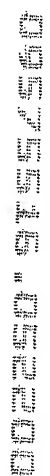


Fig. 6

Author Receives the Edited Electronic Document from Reviewer

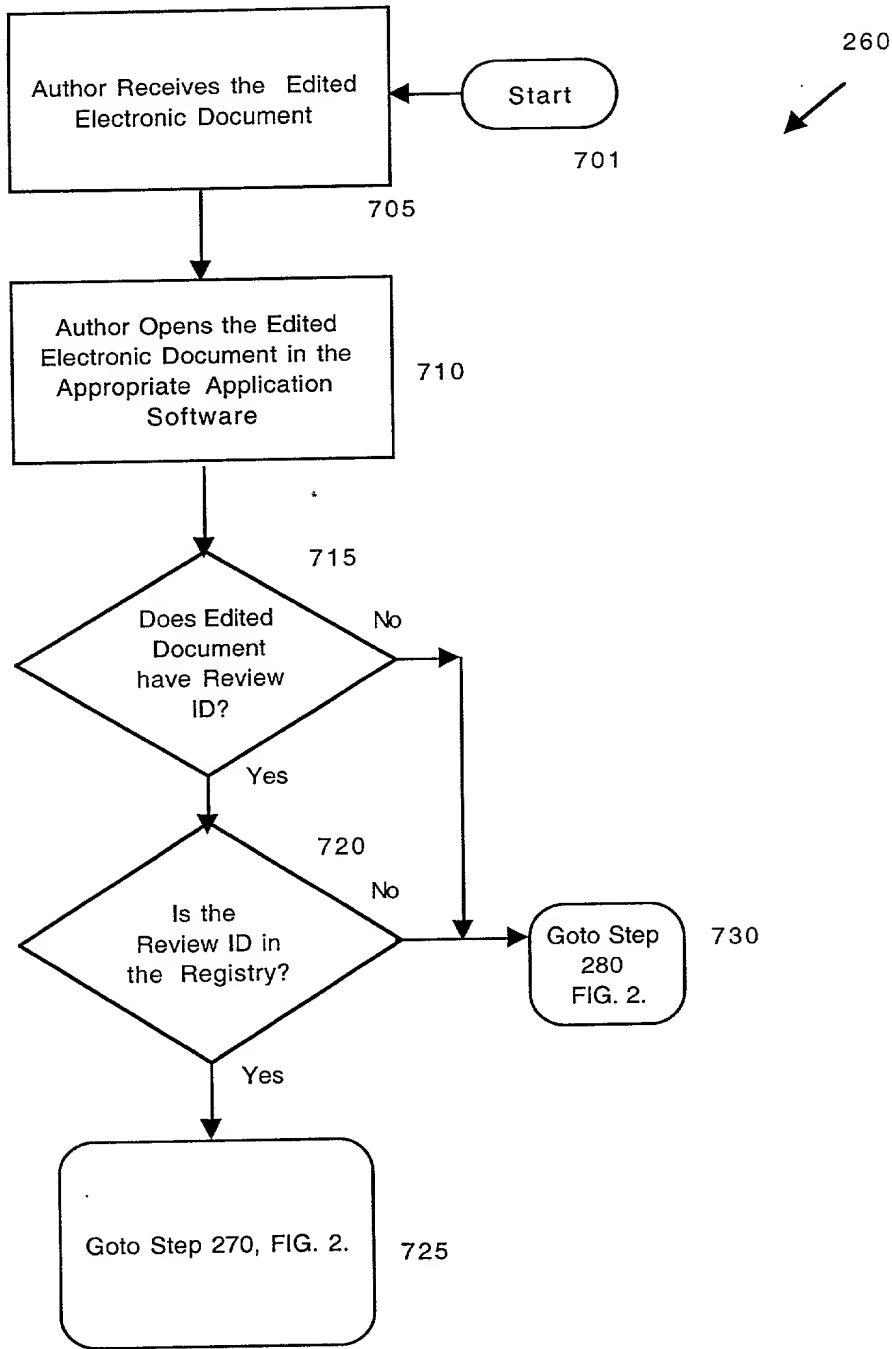


Fig. 7

Author Merges Changes from Edited Electronic Document with the Electronic Document

002250 052200 0575516 052200

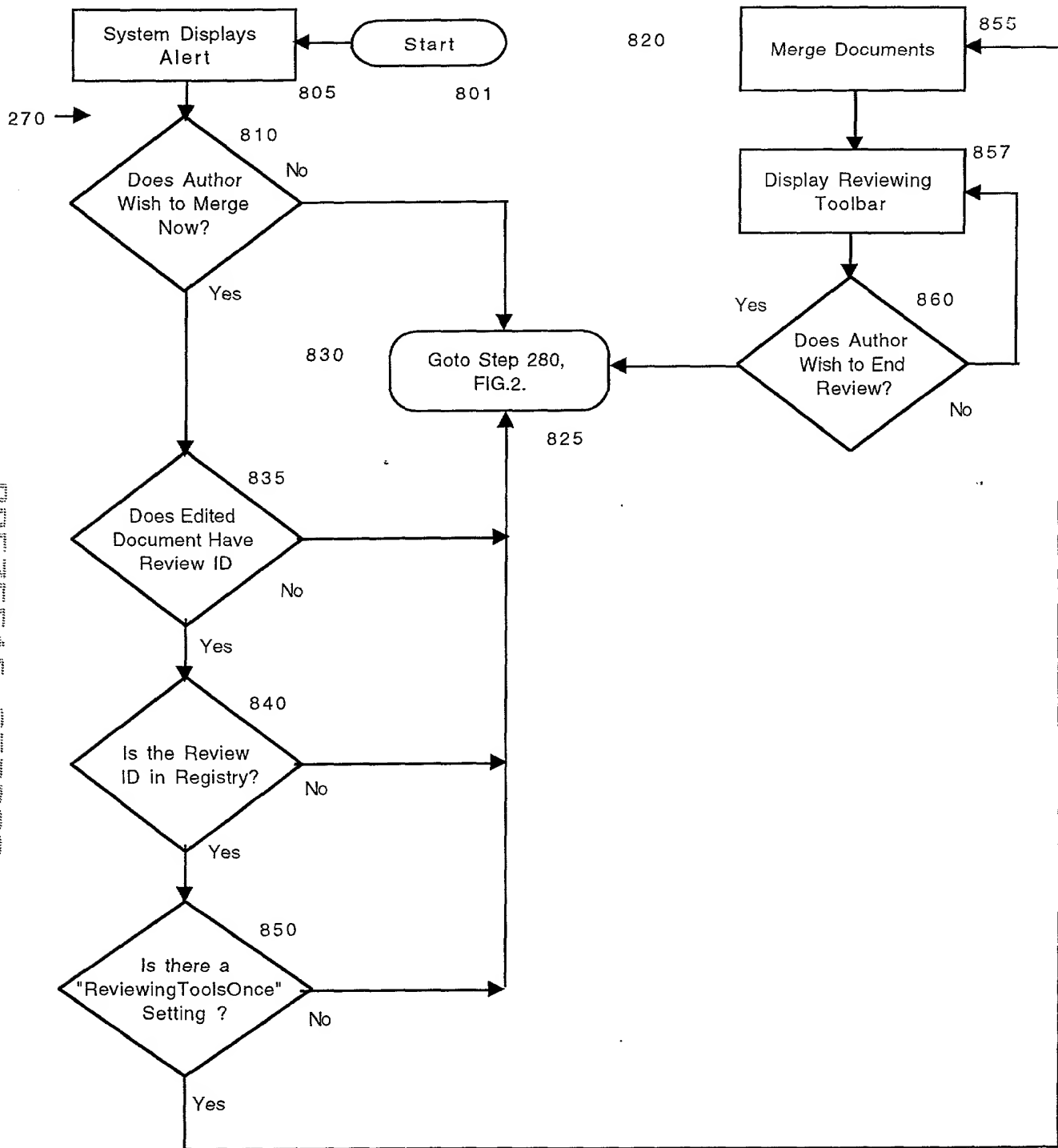


Fig. 8